Opmetrix User Manual

Version 4.2 onwards

July 2014

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iPad Home Screen – Starting the Opmetrix App

The home screen on your iPad displays application icons. You can swipe your finger left and right to rotate through the home screens and view icons.

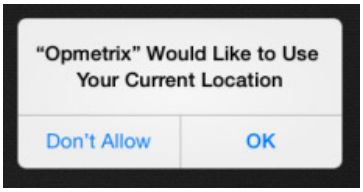
Start Opmetrix	Press the Home Button (Round Button on iPad) to switch on your iPad. Locate the home screen with the Opmetrix Icon and tap it to start

Login

Every user has their own username and password. This determines the functions available and filters to display an individual customer/store list.

Username and password is not case sensitive. You can use either upper or lower case.

Login Tap the Server field then use the iPad keyboard to enter your Server address provided to you by head office. Tap on Username and password fields to enter in respective information. When complete tap **Login**

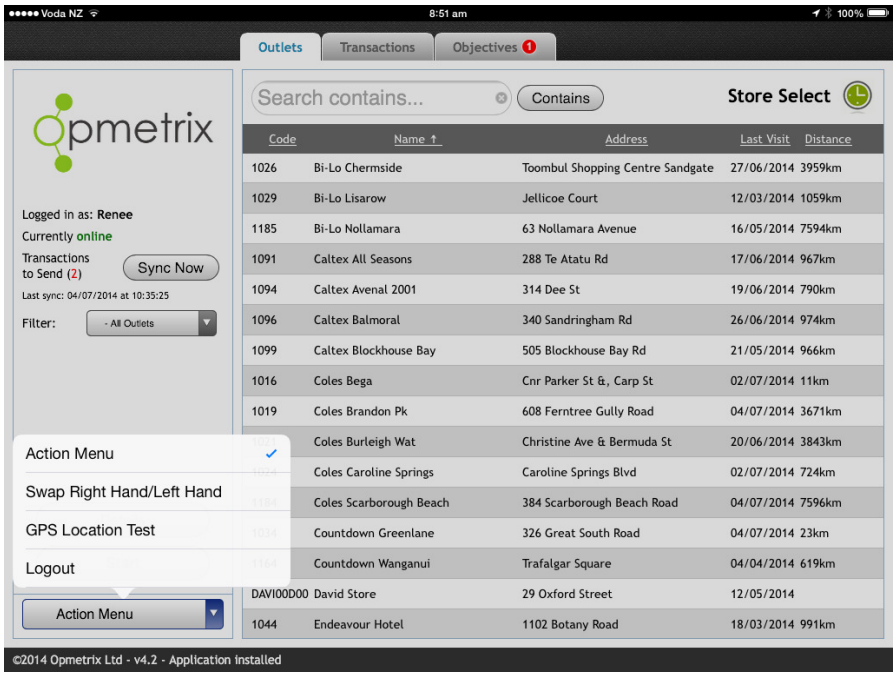


Important:

Initially, popup messages regarding using your current location will appear. Always tap OK to confirm these types of messages. After two confirmations they will not re-appear.

Action Menu

After logging in users have various options when tapping on the Action Menu.


Voda NZ
8:51 am
100%
Outlets
Transactions
Objectives
Search contains...
Contains
Store Select
Code
Name
Address
Last Visit
Distance
1026 Bi-Lo Chermside Toombul Shopping Centre Sandgate 27/06/2014 3959km
1029 Bi-Lo Lisarow Jellicoe Court 12/03/2014 1059km
1185 Bi-Lo Nollamara 63 Nollamara Avenue 16/05/2014 7594km
1091 Caltex All Seasons 288 Te Atatu Rd 17/06/2014 967km
1094 Caltex Avenal 2001 314 Dee St 19/06/2014 790km
1096 Caltex Balmoral 340 Sandringham Rd 26/06/2014 974km
1099 Caltex Blockhouse Bay 505 Blockhouse Bay Rd 21/05/2014 966km
1016 Coles Bega Cnr Parker St &, Carp St 02/07/2014 11km
1019 Coles Brandon Pk 608 Ferntree Gully Road 04/07/2014 3671km
Coles Burleigh Wat Christine Ave & Bermuda St 20/06/2014 3843km
Coles Caroline Springs Caroline Springs Blvd 02/07/2014 724km
Coles Scarborough Beach 384 Scarborough Beach Road 04/07/2014 7596km
Countdown Greenlane 326 Great South Road 04/07/2014 23km
Countdown Wanganui Trafalgar Square 04/04/2014 619km
DAVI00D00 David Store 29 Oxford Street 12/05/2014
1044 Endeavour Hotel 1102 Botany Road 18/03/2014 991km
Logged in as: Renee
Currently online
Transactions to Send (2)
Sync Now
Last sync: 04/07/2014 at 10:35:25
Filter:
- All Outlets
Action Menu
Swap Right Hand/Left Hand
GPS Location Test
Logout
Action Menu
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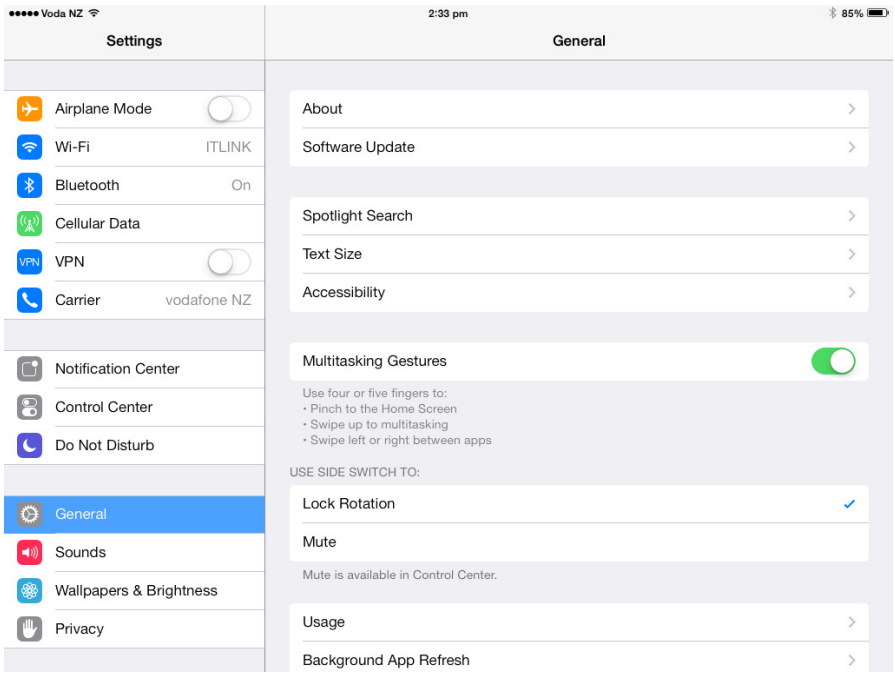
Swap Right Hand / Left Hand Tap this option to move the task bar from left hand side to right hand side.

GPS Location Test Tap to confirm your GPS location.

Logout Tap on **Logout** and users will be returned to the Login Screen. Note, a user can only be logged into Opmetrix on one device at a time. If users switch for example between an iPad and using a laptop with Opmetrix App, you must first logout of one device before logging into another

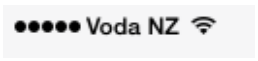
Airplane Mode

To disable communications (3G and Wi-Fi) you must switch the iPad to airplane mode. The top left hand corner indicates the current status.

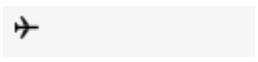


Airplane Mode

Select Settings from the home iPad menu. Tap the on/off switch to enable/disable airplane mode. When airplane mode is off, the top right hand corner status will indicate if 3G or Wi-Fi is active



When airplane mode is active the status will be an airplane picture



Online / Offline Status

The top left hand side of the Store Select screen advises if you are currently **online** or **offline**.

You can continue to use Opmetrix when you are offline, however you cannot complete a synchronisation to send and update data to head office and you cannot log out of the system unless the system is online.

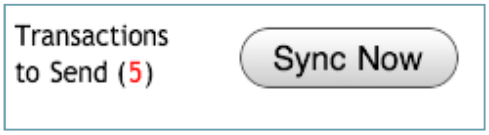
Transactions to Send

Sync Fails

Data is not lost if a sync times out or fails. Continue to the next call and simply try again later.

.

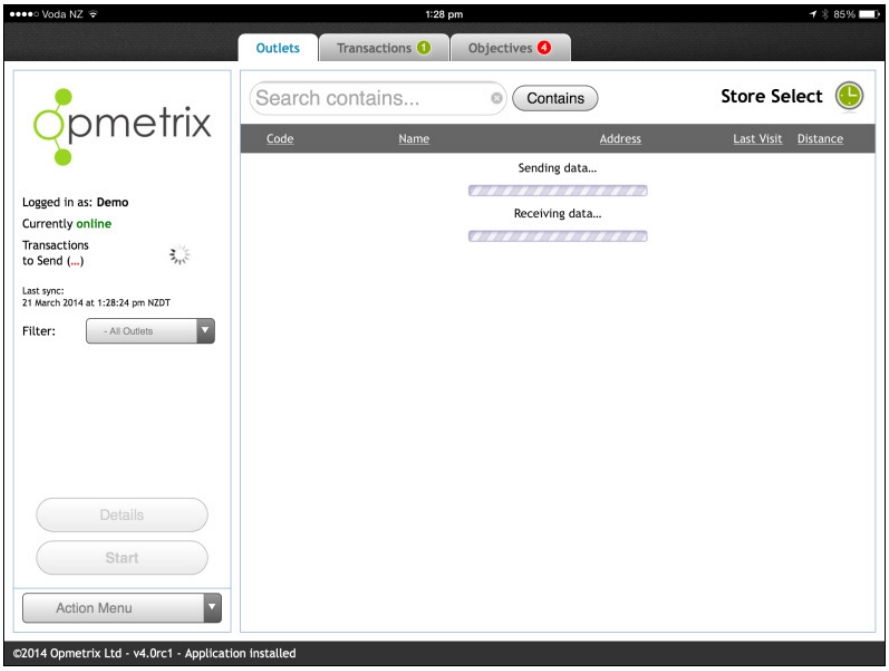
Transactions to send shows the number of transactions you have completed but not yet sent to head office. These could be made up of orders, calling cards, emails photos or merchandising checks. Once a synchronisation is complete this number returns to zero.



Sync Now

We recommend that after every outlet/customer call, you complete a synchronisation. This is subject to being in good mobile coverage and being online with the Opmetrix.

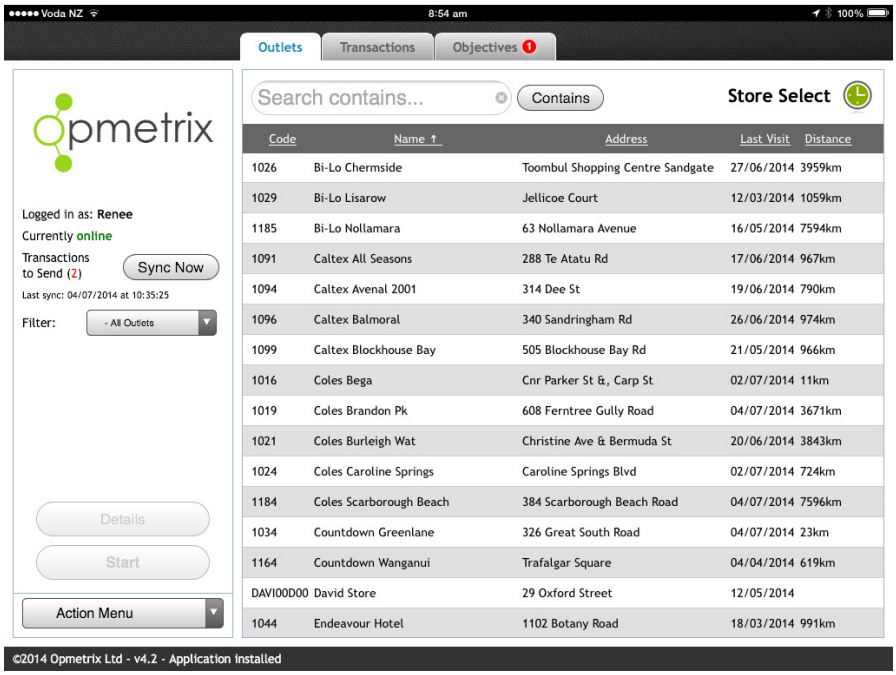
If you are **offline** all features are still available and it is important to sync when next in coverage.



Sync Now	Tap to initiate a data transfer. This both sends new data to head office and updates your system with latest customer and product information. A synchronisation should take between 15 and 60 seconds depending on coverage.

Customers & Journey Plans

The Store select screen displays a list of outlets/customers. Typically this list does not display all customers, but only the customers assigned to the login used.


Voda NZ
8:54 am
100%
Outlets
Transactions
Objectives 1
Opmetrix
Logged in as: Renee
Currently online
Transactions to Send (2)
Sync Now
Last sync: 04/07/2014 at 10:35:25
Filter:
- All Outlets
Details
Start
Action Menu
Search contains...
Contains
Store Select
Code
Name ↑
Address
Last Visit
Distance
1026 Bi-Lo Chermside Toombul Shopping Centre Sandgate 27/06/2014 3959km
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DAVI00D00 David Store 29 Oxford Street 12/05/2014
1044 Endeavour Hotel 1102 Botany Road 18/03/2014 991km
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Sort by Column

Tapping any of the column headers (underlined) will sort the information by that column. Tap again to sort ascending or descending.

Tip:

Sort by the distance column to locate stores close to where you are currently located

Select an Outlet Scroll up & down the customer list, tap to select. The selected customer is then highlighted in yellow.

Search Tap in the Search box and enter in part of the customer code or name. The list filters to display on matching customers. Search can be switched from **contains** (matches any part of the code or name) to **begins** (matches starting characters only).

Group Filter This filter is located on the left hand side. Tap the Group dropdown to select and filter by customer group

Store Select - Details

Once a Store has been selected tapping **Details** displays further information regarding this customer.

Details	Displays customer details. Select **Done** to close Some information may be visible or non visible eg Customer Account balances.
Get Directions	If online and a map is displayed, tap the map to open the iPad Maps application. This can be used to get directions from your current location to the customer. You can return to Opmetrix by tapping the iPad home button and selecting the Opmetrix icon

Store Select – Journey Plan

Customer visits will be displayed if Journey Plan functionality is utilised. Selecting a date shows the customers to visit that day along with the order (or time) which they should be called on.

Journey Plan maintenance is a head office function and cannot be set on the iPad, however you can schedule a one off appointment change (covered later in calling cards).

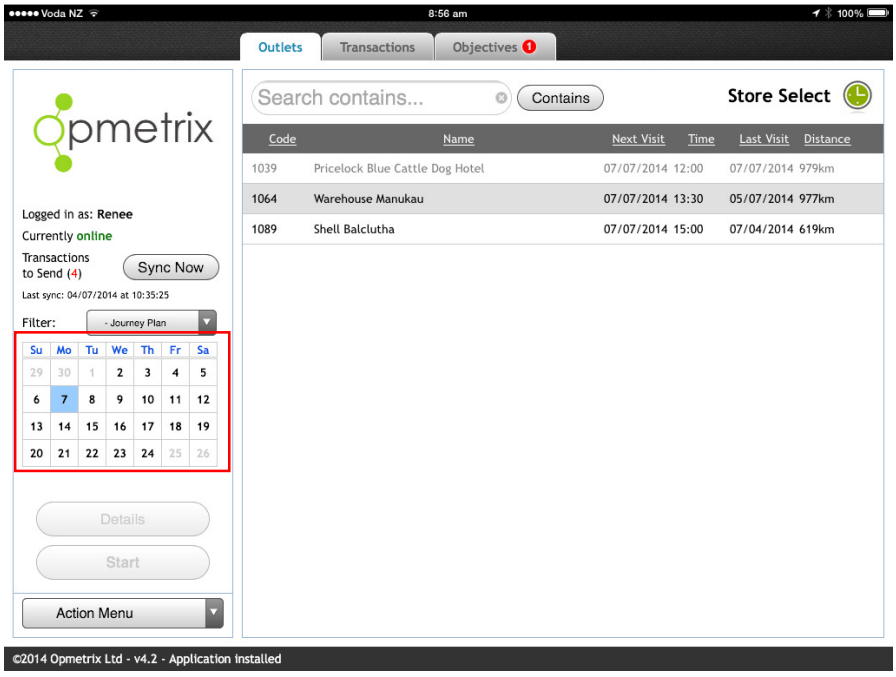
Journey plans is an optional feature and may or may not be visible.

See Future Days

Opmetrix always has the next 14 days worth of appointments preloaded from today.

Tip:

You can still complete an unscheduled call. From the group filter select All and then select the customer you require.



Calendar System defaults to today's date. Select a date to see another days calls.

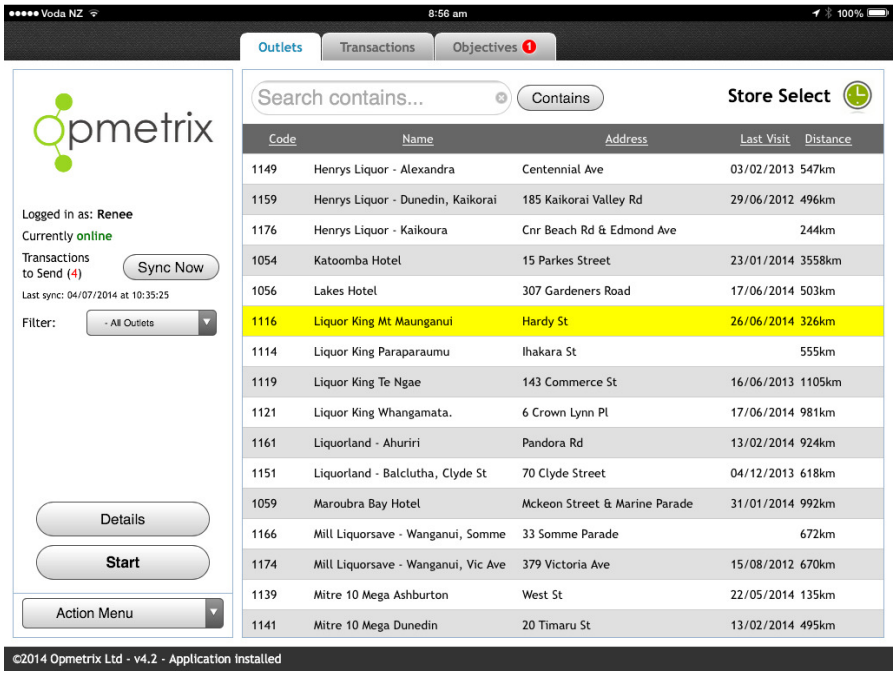
See All Tap the Group drop down and change from **** Journey Plan ** to *** ALL ***** to see all customers.

Completed Once a call has been completed for that customer on that day, the customer line is greyed out, indicating the call is complete.

Completing a Store Call

Store Call - Start a Call

Once a store is selected (highlighted in yellow) tap the Start button to begin this call. This should be done when entering the store or in the car park as it records the start time of the call.


Voda NZ
8:56 am
100%
Outlets
Transactions
Objectives
Search contains...
Contains
Store Select
Logged in as: Renee
Currently online
Transactions to Send (4)
Sync Now
Last sync: 04/07/2014 at 10:35:25
Filter:
- All Outlets
Details
Start
Action Menu
Code Name Address Last Visit Distance
1149 Henrys Liquor - Alexandra Centennial Ave 03/02/2013 547km
1159 Henrys Liquor - Dunedin, Kaikorai 185 Kaikorai Valley Rd 29/06/2012 496km
1176 Henrys Liquor - Kaikoura Cnr Beach Rd & Edmond Ave 244km
1054 Katoomba Hotel 15 Parkes Street 23/01/2014 3558km
1056 Lakes Hotel 307 Gardeners Road 17/06/2014 503km
1116 Liquor King Mt Maunganui Hardy St 26/06/2014 326km
1114 Liquor King Paraparaumu Ihakara St 555km
1119 Liquor King Te Ngae 143 Commerce St 16/06/2013 1105km
1121 Liquor King Whangamata. 6 Crown Lynn Pl 17/06/2014 981km
1161 Liquorland - Ahuriri Pandora Rd 13/02/2014 924km
1151 Liquorland - Balclutha, Clyde St 70 Clyde Street 04/12/2013 618km
1059 Maroubra Bay Hotel Mckeon Street & Marine Parade 31/01/2014 992km
1166 Mill Liquorsave - Wanganui, Somme 33 Somme Parade 672km
1174 Mill Liquorsave - Wanganui, Vic Ave 379 Victoria Ave 15/08/2012 670km
1139 Mitre 10 Mega Ashburton West St 22/05/2014 135km
1141 Mitre 10 Mega Dunedin 20 Timaru St 13/02/2014 495km
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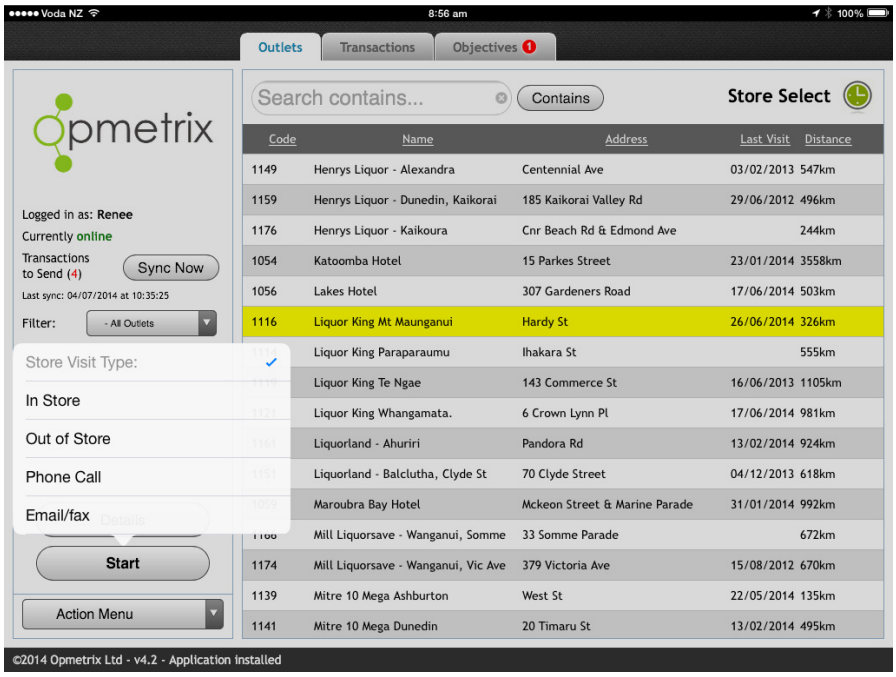
Select Customer Use the Journey Plan (if visible), Group Filter or search methods to locate the Store. Tap to select it and highlight it in yellow.

Start Tap the Start Button to begin this call and record the start time

Store Visit Type

Once a store is selected options for users are displayed. Eg. A sales rep may tap on out of store if they want to review previous call notes and previous sales prior to calling on the outlet.


Voda NZ
8:56 am
100%
Outlets
Transactions
Objectives
opmetrix
Logged in as: Renee
Currently online
Transactions to Send (4)
Sync Now
Last sync: 04/07/2014 at 10:35:25
Filter:
- All Outlets
Store Visit Type:
In Store
Out of Store
Phone Call
Email/fax
Start
Action Menu
Search contains...
Contains
Store Select
Code
Name
Address
Last Visit
Distance
1149 Henrys Liquor - Alexandra Centennial Ave 03/02/2013 547km
1159 Henrys Liquor - Dunedin, Kaikorai 185 Kaikorai Valley Rd 29/06/2012 496km
1176 Henrys Liquor - Kaikoura Cnr Beach Rd & Edmond Ave 244km
1054 Katoomba Hotel 15 Parkes Street 23/01/2014 3558km
1056 Lakes Hotel 307 Gardeners Road 17/06/2014 503km
1116 Liquor King Mt Maunganui Hardy St 26/06/2014 326km
Liquor King Paraparaumu Ihakara St 555km
Liquor King Te Ngae 143 Commerce St 16/06/2013 1105km
Liquor King Whangamata. 6 Crown Lynn Pl 17/06/2014 981km
Liquorland - Ahuriri Pandora Rd 13/02/2014 924km
Liquorland - Balclutha, Clyde St 70 Clyde Street 04/12/2013 618km
Maroubra Bay Hotel Mckeon Street & Marine Parade 31/01/2014 992km
Mill Liquorsave - Wanganui, Somme 33 Somme Parade 672km
1174 Mill Liquorsave - Wanganui, Vic Ave 379 Victoria Ave 15/08/2012 670km
1139 Mitre 10 Mega Ashburton West St 22/05/2014 135km
1141 Mitre 10 Mega Dunedin 20 Timaru St 13/02/2014 495km
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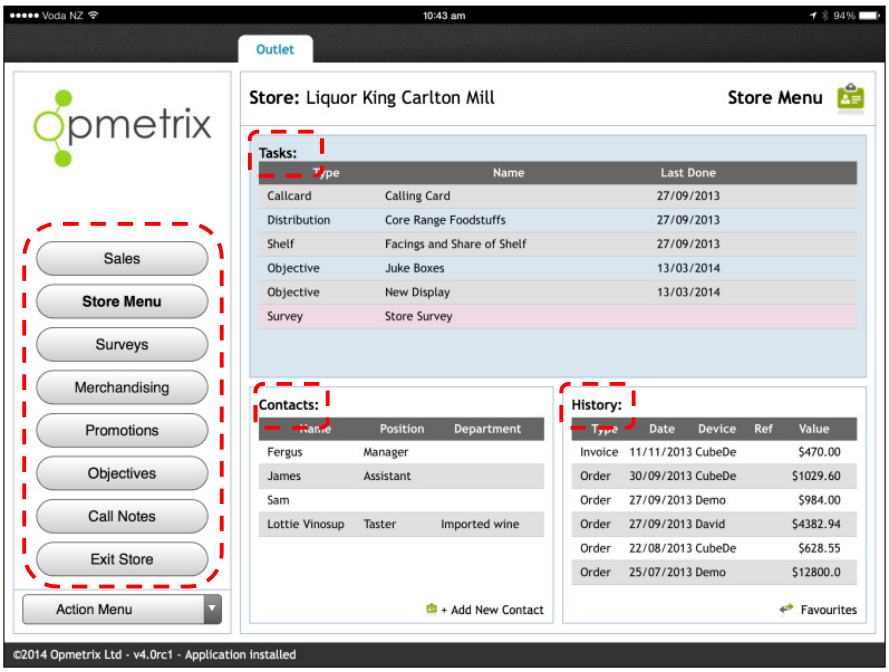
Call – Store Menu Overview

Once a call has been started, Opmetrix will display the store menu.

There are four key areas – Tasks, Contacts, History and the navigation buttons as listed on the left hand side below.

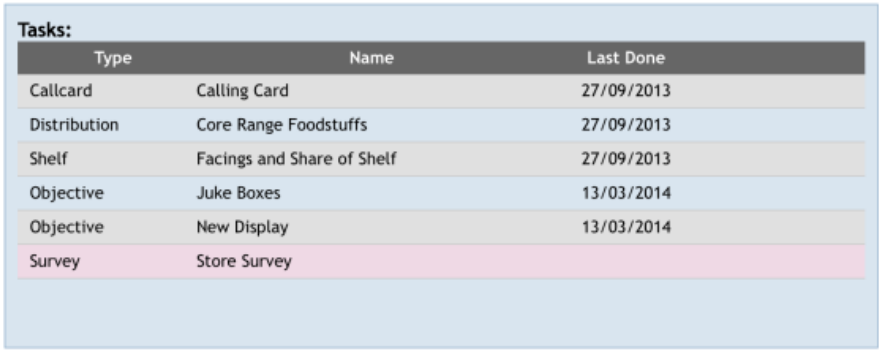


Sales	To begin a new order, invoice or credit.
Store Menu	To display the Task, Contact and History lists.
Surveys	To display all active surveys.
Merchandising	To complete Merchandising checks
Promotions	To display a list of Promo Ops and Compliances
Objectives	To display a list of current objectives
Call Notes	To display previously entered call notes
Exit Store	To exit this store and finish the store visit

Action Menu	View Outlet Details, Add a New store specific Objectives and Exit Store

Store Call – Store Menu Lists Overview

Task List



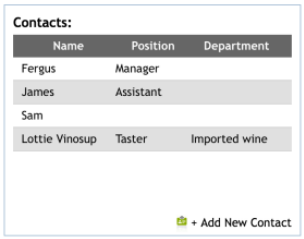
Tasks:

Type	Name	Last Done
Callcard	Calling Card	27/09/2013
Distribution	Core Range Foodstuffs	27/09/2013
Shelf	Facings and Share of Shelf	27/09/2013
Objective	Juke Boxes	13/03/2014
Objective	New Display	13/03/2014
Survey	Store Survey	

The task list displays a list of actions that should be completed for this store. They can include tasks such as Surveys, Price Checks, Distribution checks, Objectives, Promotion opportunities and promotion compliances. The list is filtered to actions that are appropriate for the store selected.

Compulsory actions are coloured pink. If you exit the store without completing these, Opmetrix will prompt you to complete.

Calling Card



Contacts:

Name	Position	Department
Fergus	Manager	
James	Assistant	
Sam		
Lottie Vinosup	Taster	Imported wine

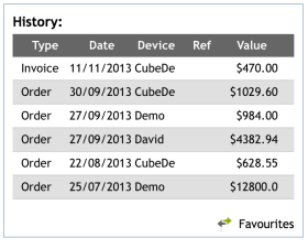
+ Add New Contact

Each Stores Task list also has an action in it called Calling Card. The Calling card should be completed at least once per store visit and can also be used to record and escalate issues or notes regarding this store.

Contact List – see next page for Contact Management

Store contacts can be added, edited and deleted from this contact list section.

History



History:

Type	Date	Device	Ref	Value
Invoice	11/11/2013	CubeDe		$470.00
Order	30/09/2013	CubeDe		$1029.60
Order	27/09/2013	Demo		$984.00
Order	27/09/2013	David		$4382.94
Order	22/08/2013	CubeDe		$628.55
Order	25/07/2013	Demo		$12800.0

Favourites

Previous Order, Invoice and Credits are displayed in the History list. Transactions can be viewed by tapping on them

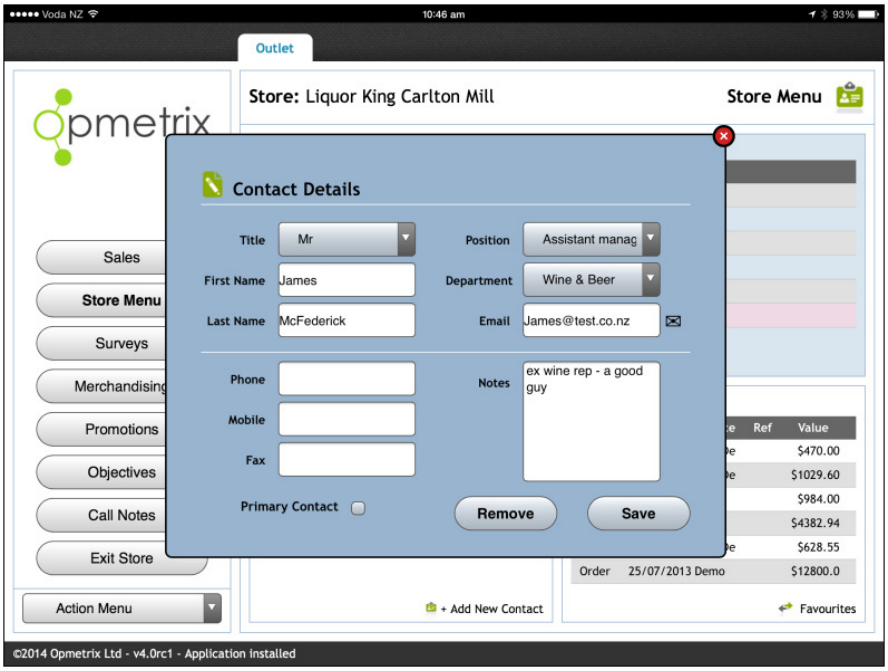
Contacts

Contacts List

Multiple contacts within a store can be added and maintained. Primary contacts can be tagged and these highlight in bold within the contact list.

If a contact's email is included, a copy of a calling card or sales transaction can be sent back to that person.

All contacts are synchronised to the central CMS system.

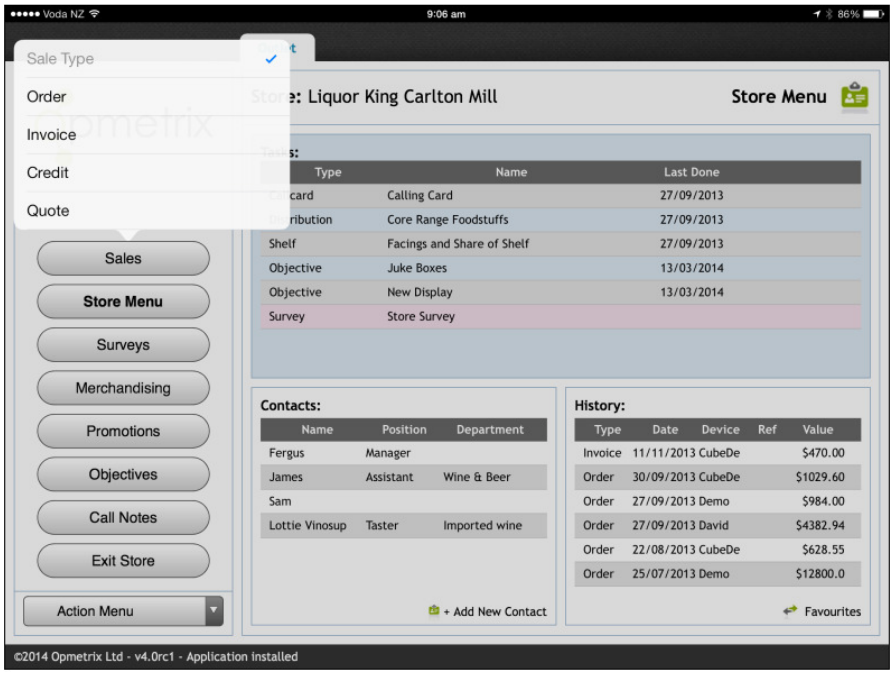


Add Contact	Tap Add new Contact, enter data then **Save**
Edit Contact	Tap the contact to Edit then S**ave** when done
Delete Contact	Tap the contact then tap **Remove**

Sales - Order, Invoice and Credit

Sales Start

Opmetrix can be configured to complete four types of transactions – Order, Invoice, Credit and Quote. The process for these transactions is nearly identical.

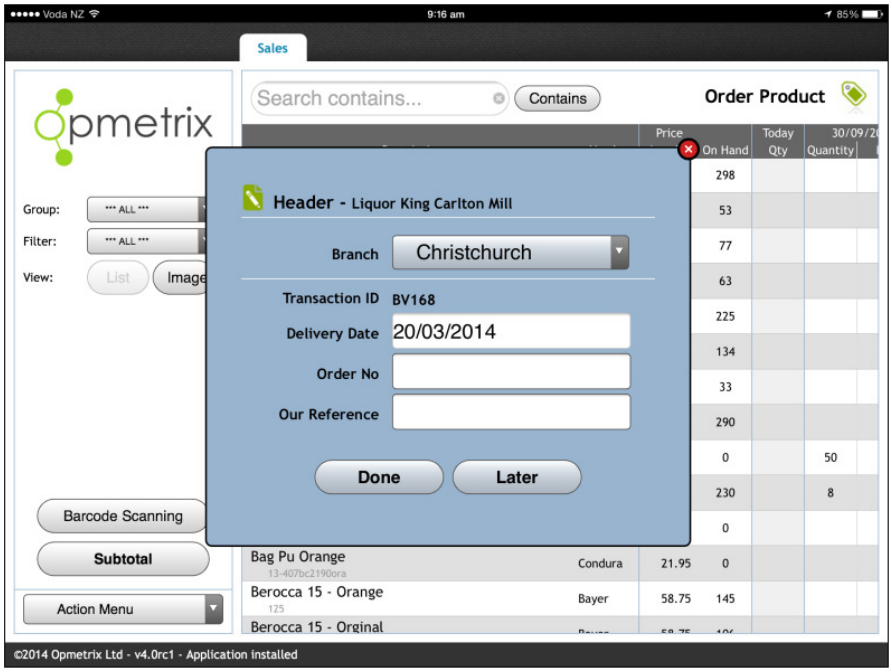


To Begin a Sales Transaction	Tap Sales then select the transaction type required

Sales Header

The Sales Header enables you to select the Branch, Delivery date, Order number and optionally an order reference for this transaction.

Sometimes you may not know the Order Number until the end of the sale. In this situation select **Later** and the system will prompt again to enter the order number again, prior to finalising the sale.

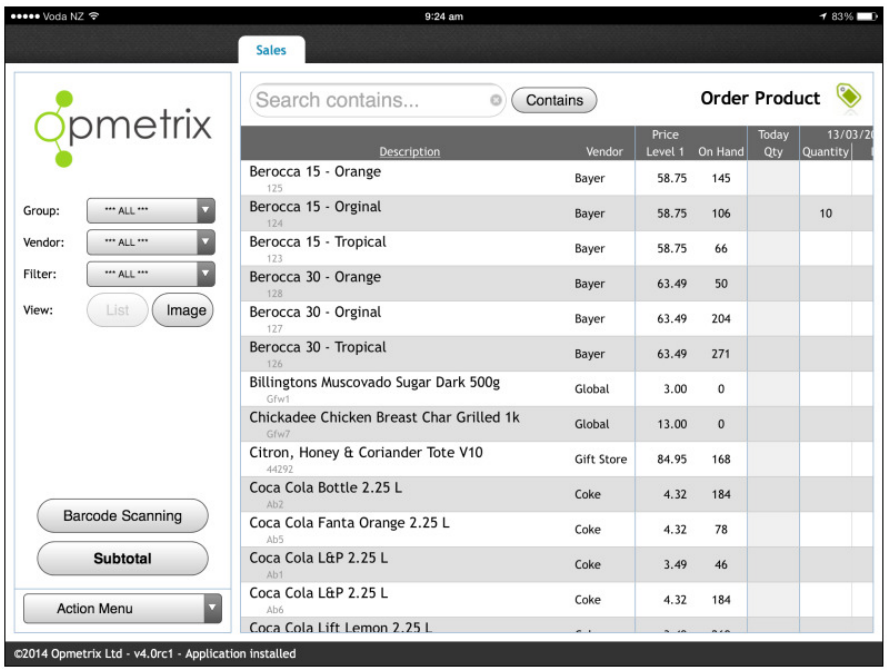


Branch	(Optional Feature) Select the branch (Warehouse) where stock should be supplied from.
Date	The Delivery date for this transaction.
Order Number	The customer's order number. If this is compulsory it will display *Required*.
Our Reference	Optional field

Product Entry Overview

There are many ways to enter products on a sale. The fastest way is “Item List” (shown below). To record more detail such as price changes, discounts or promo stock tap an item’s description to display “Item Detail” where more options become available.

There is also a search box to locate an item by its product code or part of the description


Voda NZ
9:24 am
83%
Sales
Opmetrix
Search contains...
Contains
Order Product
Group:
Vendor:
Filter:
*** ALL ***
View:
List
Image
Barcode Scanning
Subtotal
Action Menu
Description
Vendor
Price Level 1
On Hand
Today Qty
13/03/2(Quantity
Berocca 15 - Orange 125 Bayer 58.75 145
Berocca 15 - Orginal 124 Bayer 58.75 106 10
Berocca 15 - Tropical 123 Bayer 58.75 66
Berocca 30 - Orange 128 Bayer 63.49 50
Berocca 30 - Orginal 127 Bayer 63.49 204
Berocca 30 - Tropical 126 Bayer 63.49 271
Billingtons Muscovado Sugar Dark 500g Gfw1 Global 3.00 0
Chickadee Chicken Breast Char Grilled 1k Gfw7 Global 13.00 0
Citron, Honey & Coriander Tote V10 44292 Gift Store 84.95 168
Coca Cola Bottle 2.25 L Ab2 Coke 4.32 184
Coca Cola Fanta Orange 2.25 L Ab5 Coke 4.32 78
Coca Cola L&P 2.25 L Ab1 Coke 3.49 46
Coca Cola L&P 2.25 L Ab6 Coke 4.32 184
Coca Cola Lift Lemon 2.25 L
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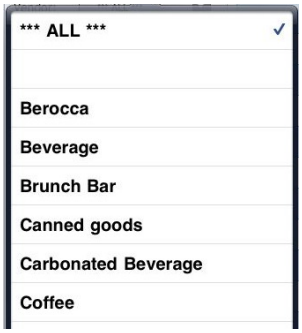
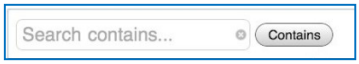
To assist in the order process, Opmetrix also displays previous sales to this customer. Scrolling to the right displays the date, quantity and price previously ordered.

Product Search and Filter

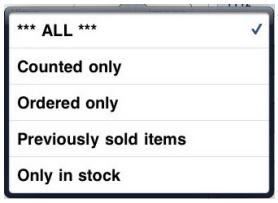
These filters are located on the left hand side of the screen.



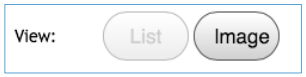
Group / **Vendor** Tap the Group or Vendor Filter and select the required category. The list filters to items within that category. Select ALL in the filter boxes to display all items.



Search Tap in the Search box and using the iPad keyboard enter in part of the product code or description. The list filters to display on matching products. Search can be switched from **contains** (matches any part of the code or description) to **begins** (matches starting characters only).



Filter To see only previously purchased items, select this filter then tap "**Previously Sold Items**". Reset to ** **All** ** to display all items



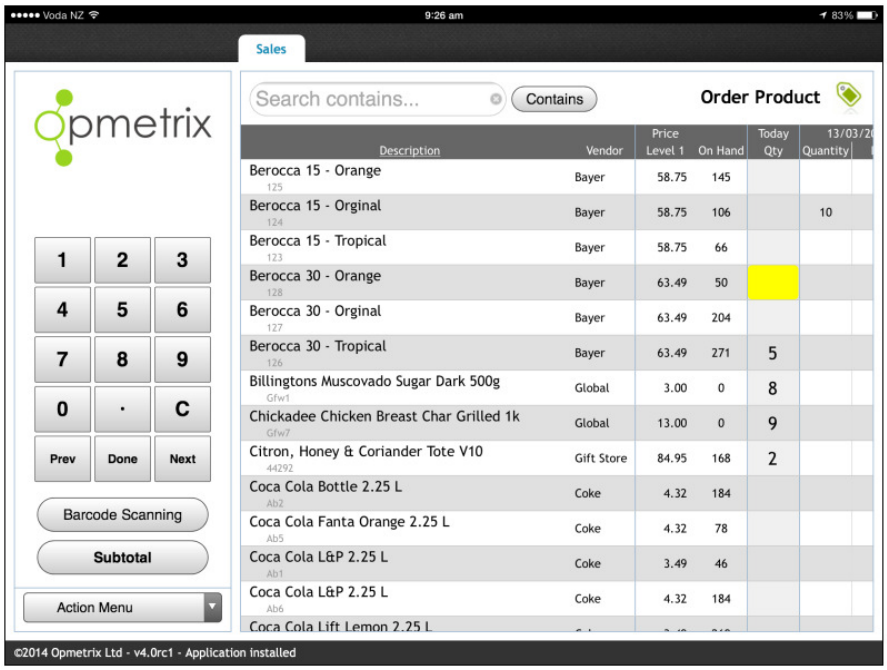
View Tap on **List** to sell in list mode, or **Image** to sell in our catalogue mode.

Product Item List Entry

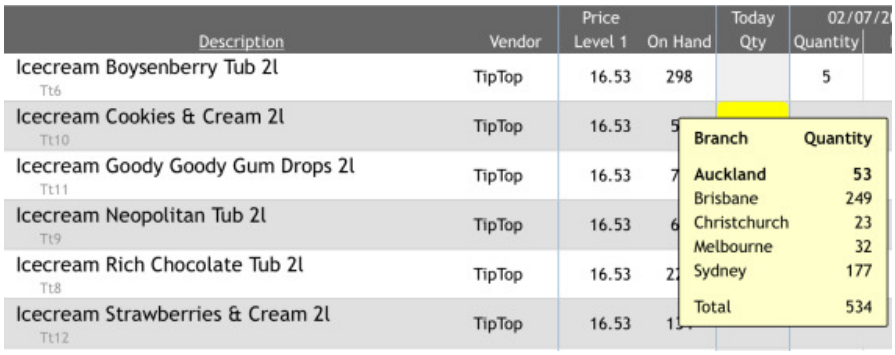
To enter quantities in a transaction, tap in the Today Qty column alongside the correct product. The keyboard then pops up enabling the quantity to be entered.

Tip

Use the Previous and Next buttons on the keypad to move up and down the column

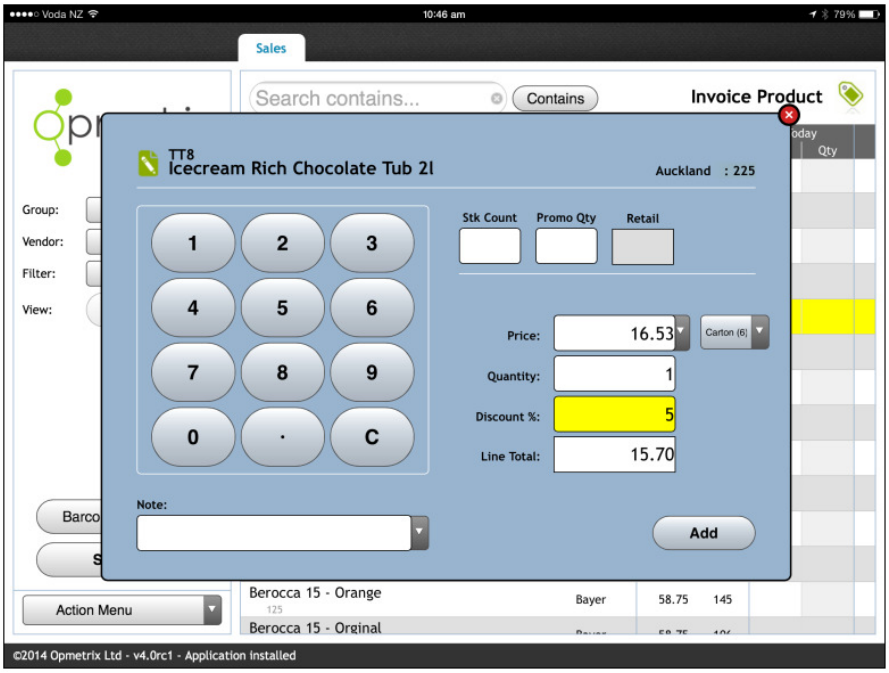


(Optional) Stock on Hand Values based on last sync are available by tapping on the On Hand quantity in list mode. If multiple stock locations are utilised a pop up per the example below, appears.



Product Item Detail Entry

To enter additional data regarding a product, tap on the Product description. The item details box appears.



Quantity	Tap to enter in the quantity required using the onscreen keyboard.
Price Change	(Optional Feature) Tap the price and enter in required price
Price Level	(Optional Feature) Tap the arrow beside the price to show up to 8 price levels.
Discount %	(Optional Feature) Enter the percentage discount for this product.
Note	Tap in the note field to write a note or select from the list using the drop down arrow.
Promo Qty	(Optional Feature) Input any free promo stock.

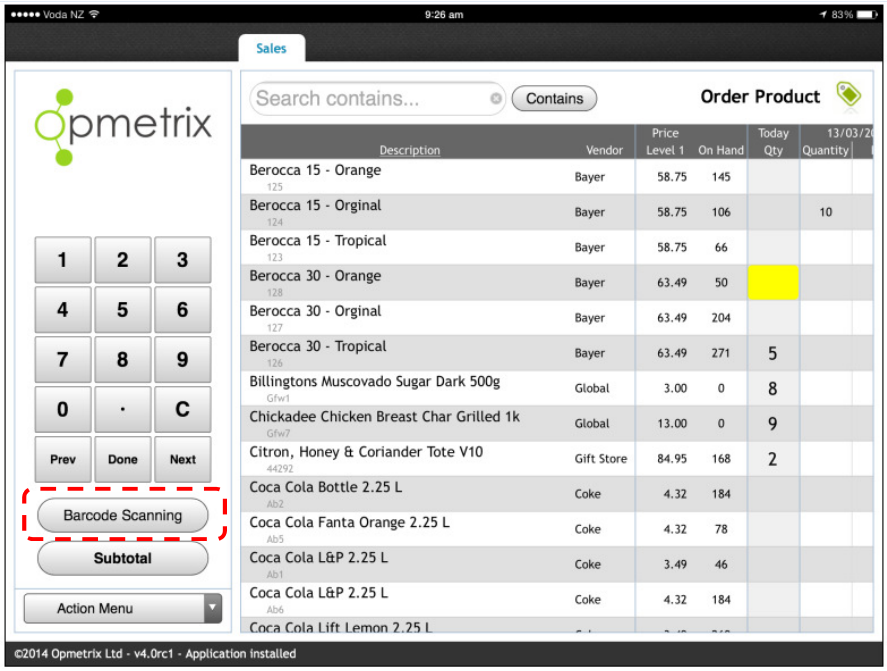
Credit Reasons

Credits can have credit reasons added on a line by line basis.

From Product List, tap on the stock item to bring up the Product Item Detail Screen
On the right hand side of notes is a reason option drop down.
Tap on drop down and select pre-entered credit reason.

Barcode Entry

To input items via barcode scanning tap on the **Barcode Scanning** button



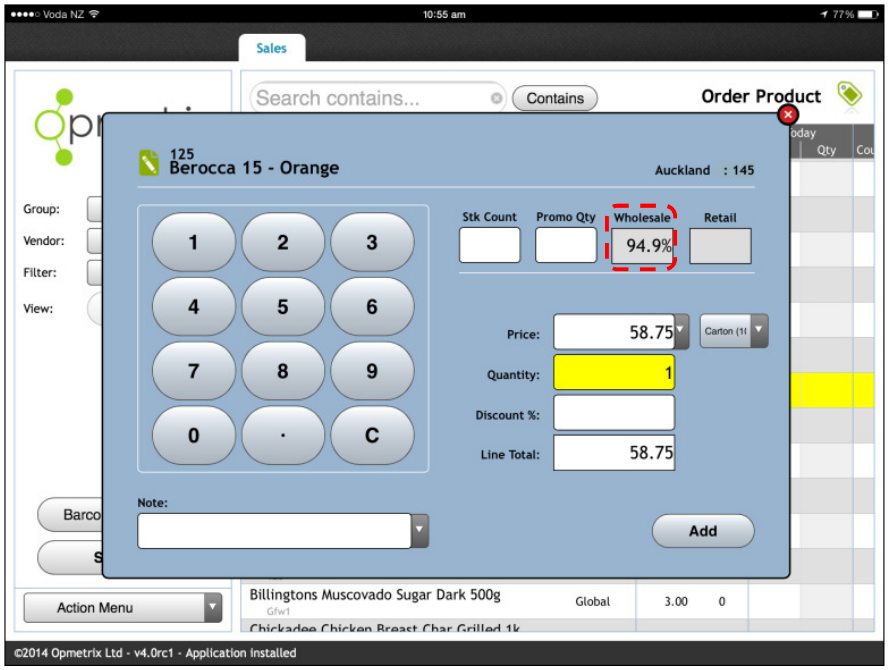
Scan barcode and adjust quantities on screen, or scan again to increase in increments of 1. Scan new item for next product ordered.

Barcode scanning is available from list or image mode.

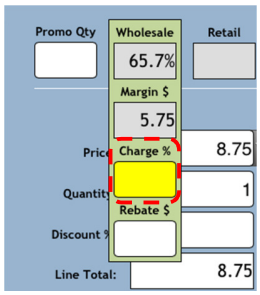
Margin Calculator – Gross Profit Margin

Wholesale Calculator - calculates your own GP

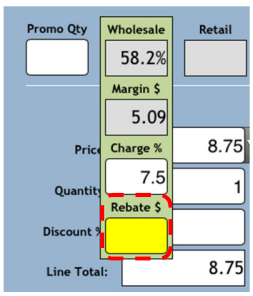
1. Tap on Wholesale



2. Enter charge percentage using onscreen number pad



3. Enter Rebate Dollars using onscreen number pad

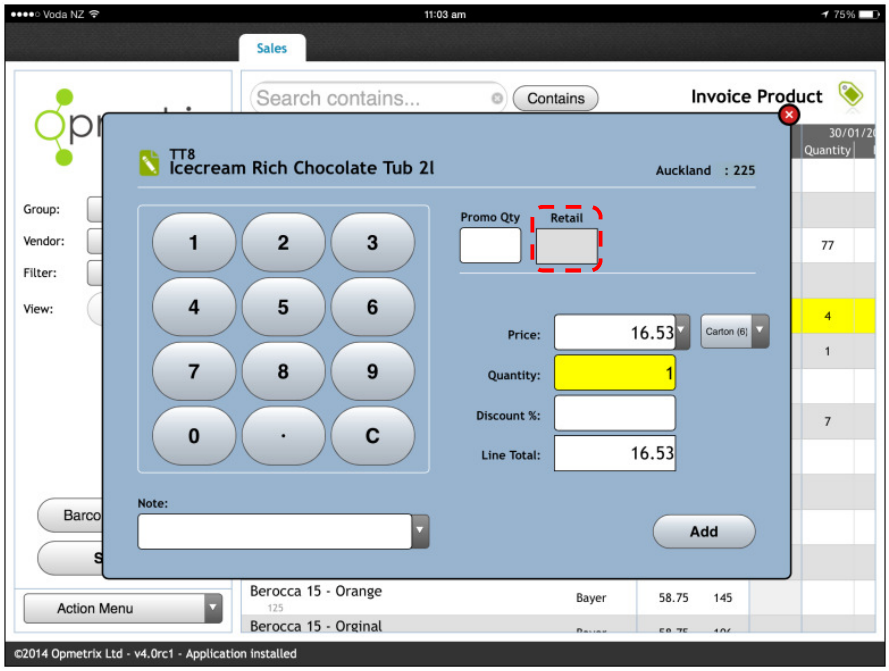


Note: This is a calculator only and any price change or discount dollars will still need to be entered in the pricing area.

Retail Calculator

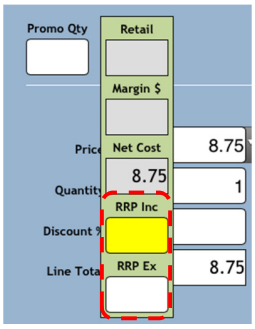
To calculate your customer's GP, use the following steps

Tap on Retail



2. Enter the Customer's RRP either GST inclusive or GST exclusive in the box below.

3. In this example the retail selling price of $12.95 results in a retail GP of 22.3% and retail margin of $2.51.



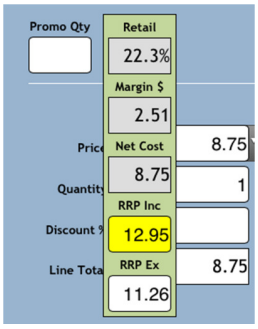
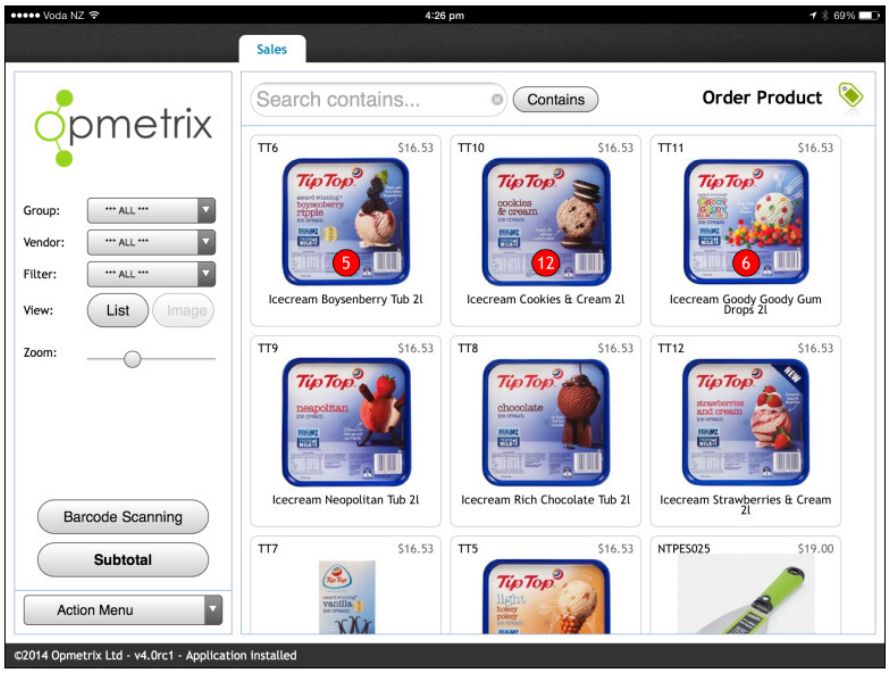


Image Catalogue

Items can also be displayed as an image catalogue. Tap Image to switch to this mode. You can still sell items by simply tapping on the image and entering the sale details for that product.

Tip:

Quantities ordered in this current order display in a red circle as highlighted in image.



Searching	Same search methods as Product List Mode apply
Filters	Same filters as Product List Mode apply
Zoom	Adjust the zoom bar to achieve zoom level. There are four zoom levels available.

Action Menu

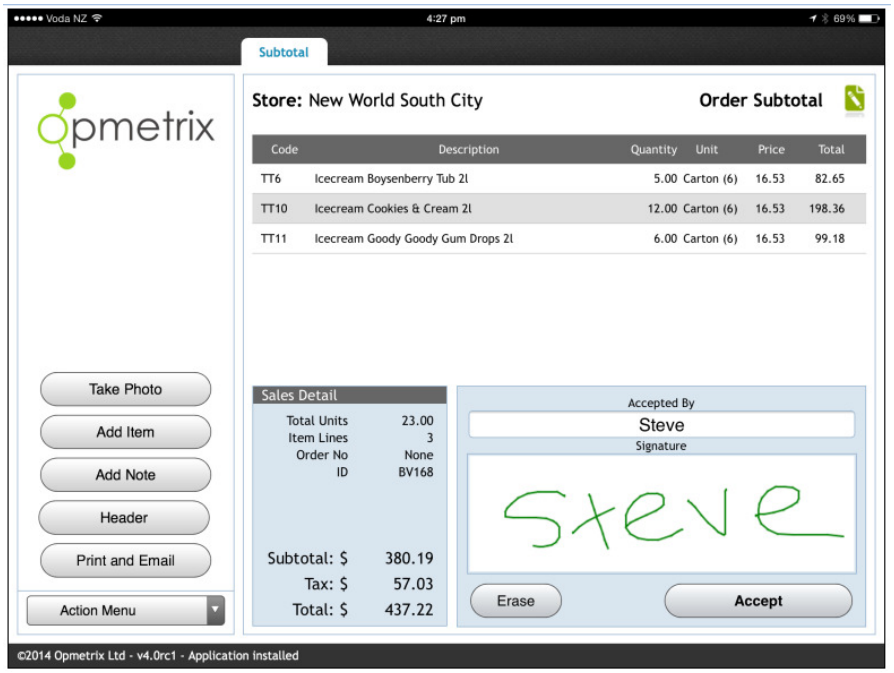
At any point during the transaction the Action Menu can be selected to:

Show / Hide Side Bar	Increases visibility for products on screen
Hold Sale	Allows current sale to be placed on hold. See separate section on recalling held transactions
Cancel Sale	Deletes current transaction with a prompt to confirm

Subtotal

At any point during transaction entry tap **Subtotal** to view the transaction so far. All items are displayed (scroll down to see more items) and promo stock is indicated in **red**

The Accept button on the subtotal screen completes the sale. This is the point of no return and the sale cannot be edited or cancelled after the Accept button is selected



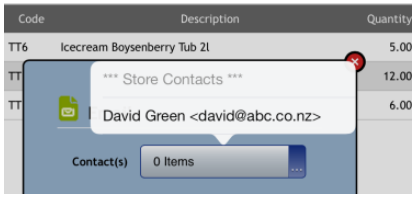
Edit/Delete Item	Tap on the product line to edit or delete
Signature	Customer can sign on the screen and enter name
Take Picture	Captures a photo and attaches it to this sale
Add Item	To add more products.
Add Note	**Add note** to attach a note to the last item of the order
Header	Tap on **Header** to adjust header details

Print / **Email**	Tap on Print & Email to Print. In order to email, options are available from existing contact list, or add a new contact and email on the fly.

Email

Once a transaction has been accepted, Opmetrix can optionally email a copy of the transaction to the customer.

The email can be sent to any existing contact in the customers contact list or a new contact with email address can be added at this point.

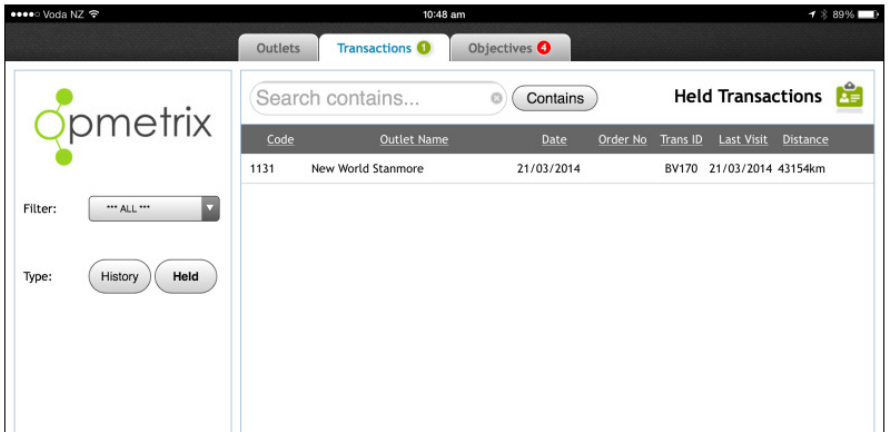


Contacts Select an existing contact to email.

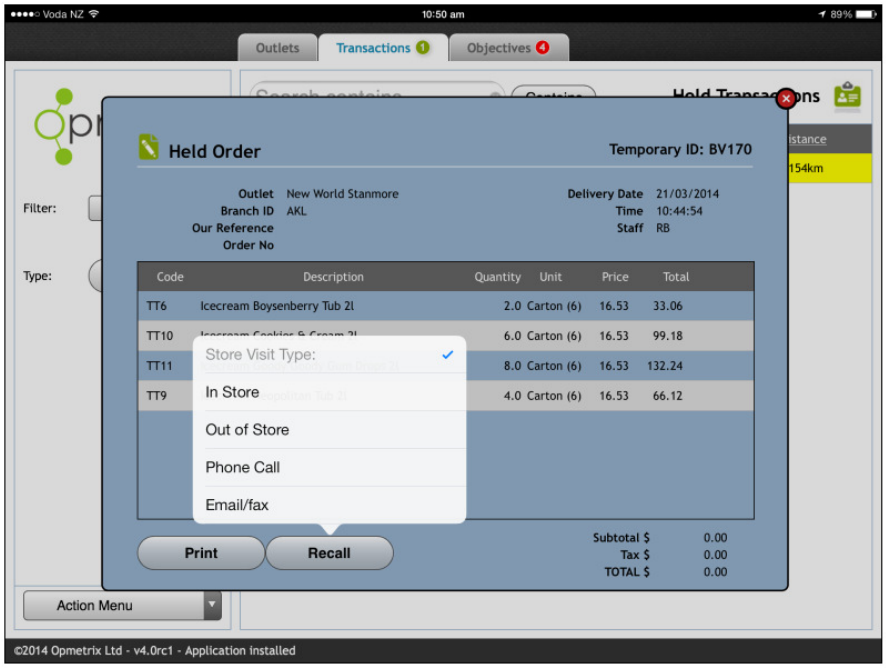
Add Contact Add a name and email address to whom the confirmation should be sent to. This also adds the recipient to the contact list.

Held Transactions

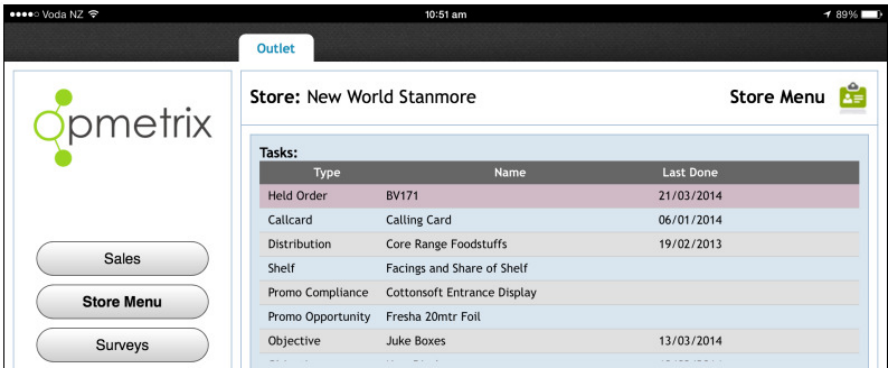
Held transactions can be accessed from the Transactions Tab by selecting the Held button.



Select the customer, select store visit type and recall the sale. Once selected the transaction is recalled to the subtotal screen where items can be added, amended, the sale accepted or cancelled.



Alternatively, if a customer has a held transaction, the held transaction can be found at the top of the task menu highlighted in red.



Calling Card

Calling Card Overview

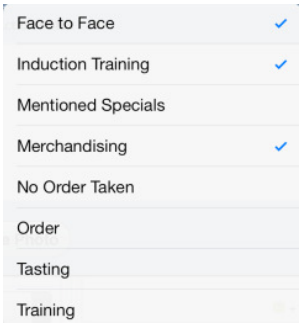
Calling cards are used to record various information regarding the store currently being called on. They are often used to

Record what happened on each store visit
Escalate issues, problems or competitor information
Record detail changes Eg Address, Phone numbers
(Optional Feature) Reschedule a visit and add this to the Journey plan as a one off visit
Take photos that relate to the calling card

All Calling cards become part of the Call History for that client and can be accessed via the **Call Notes** button.

Calling Card Entry

To add a new calling card select **Calling Card** from the Task List. The calling card details screen will display. Record all relevant information then select **save** or to exit without saving, tap the Red Cross (**X**) in the top right corner.



Call Status Status of the Call Eg Completed, Cancelled etc

Met With The person(s) met with during this store visit. This list comes from the store contact list

Call Type The actions completed on this call

Call Notes Enter information and notes regarding this call

Take Picture Captures a photo and attached it to this call card. 1 photo can be attached per calling card. However multiple calling cards per store visit can be made

Calling Card - Email Notify

Optionally you can notify other staff or customer contacts by email regarding this calling card. Select Email notify, select the staff or contacts required, then select done.

Once a synchronisation is complete a copy of the calling card will be emailed to those staff. This is useful to escalate an issue or non compliance. If a photo has been taken with this calling card, the photo is sent by email as an attachment.

Calling Card – Reschedule a Call

To reschedule a missed appointment or to book a future visit a calling card for the store and tap **reschedule call**. Select the new date from the calendar and **save** the Calling card.

The new appointment then becomes part of your Journey plan cycle. Note that this does not change the preset Journey plan; it just adds an additional one off appointment on the selected date.

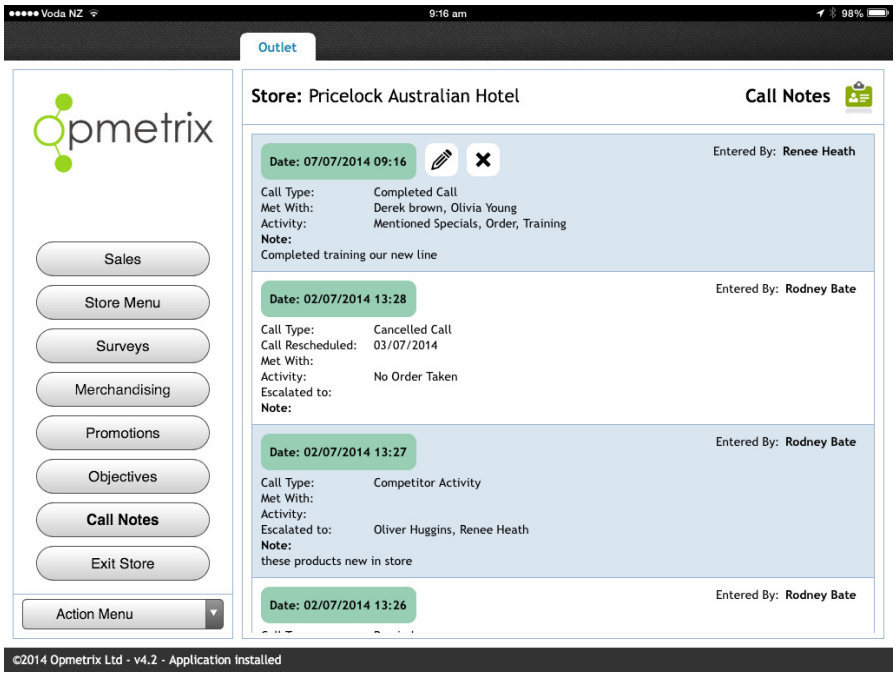
Journey plans is an optional feature and may or may not be visible.

Calling Card History

Review historic calling cards by selecting Call notes from the In-Store menu.

Tip

To return to the In-Store view, tap on Store Menu

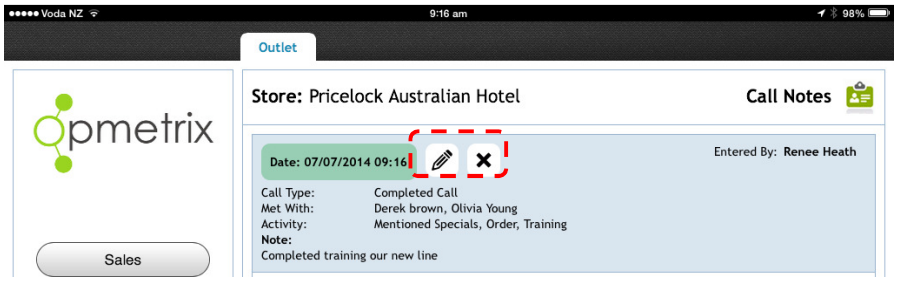


Edit Call Card

Edit or delete a call card only when still in store.

An option is available to edit or delete a call card prior to selecting **Exit Store.**

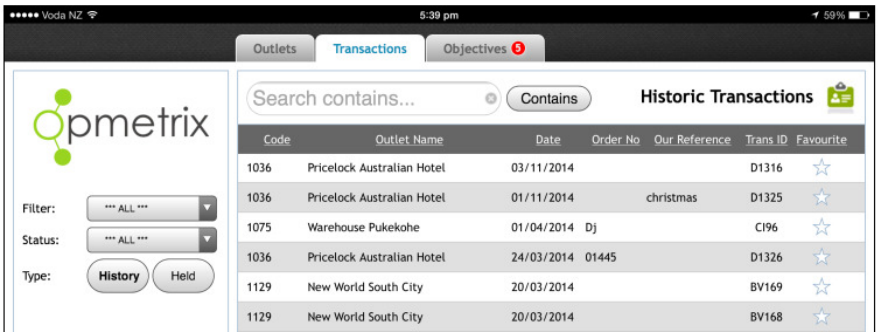
Tap on pencil to edit or X to delete



Note: Call Cards cannot be edited once user has selected **Exit Store.**

Transactions

Transaction history can be viewed by tapping on the Transactions tab.



This option allows users to:

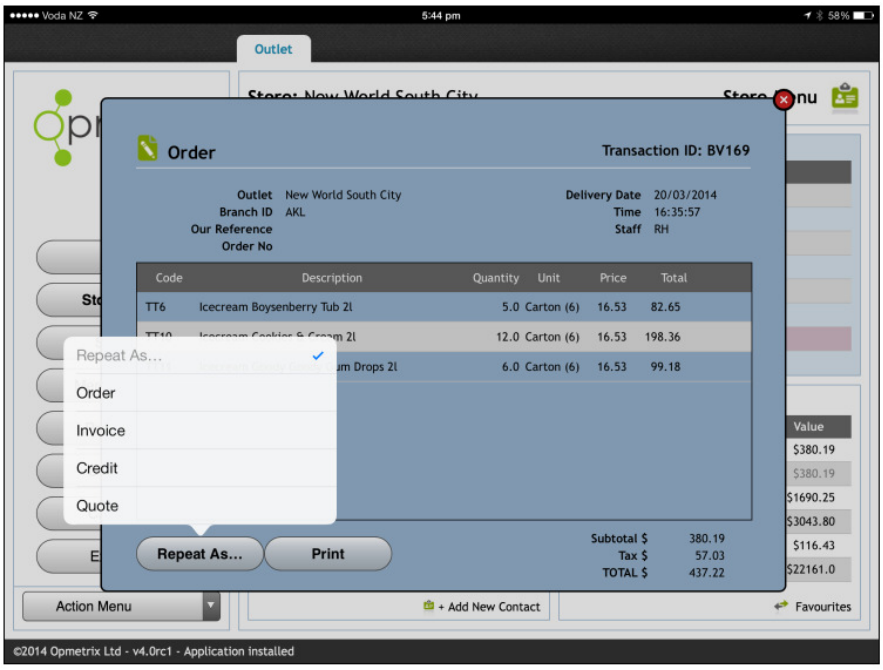
- View recent transactions
- Re-print (optional)
- Highlight order as a ‘Favourite’ this reflects a sale that could be repeated at a different outlet.
- To repeat a transaction or utilize a favourite, users need to exit this screen and then select the outlet required.

Repeat Transaction

Transactions can be repeated and utilized as a template with stock items, quantities etc able to be amended, added, deleted.

After selecting the outlet required, users can:

In the Store Menu's Sales History tap on a previous transaction to display on screen.
Select **Repeat As** and select transaction type from pop up list.
The repeat transaction process is then the same as a normal transaction.



Utilizing Favourites

A favourite is a transaction that can be utilized as a template for all customers. Once selected, favourites can have stock items deleted or added to create a new transaction.

Favourite orders are highlighted in the Sales History Tab as per Sales History above.

To use a favourite order:

- Select Outlet and start sale
- Select **Favourites icon** from the Sales History section
- Tap on the favourite transaction and follow the same process as repeating a transaction

Objectives

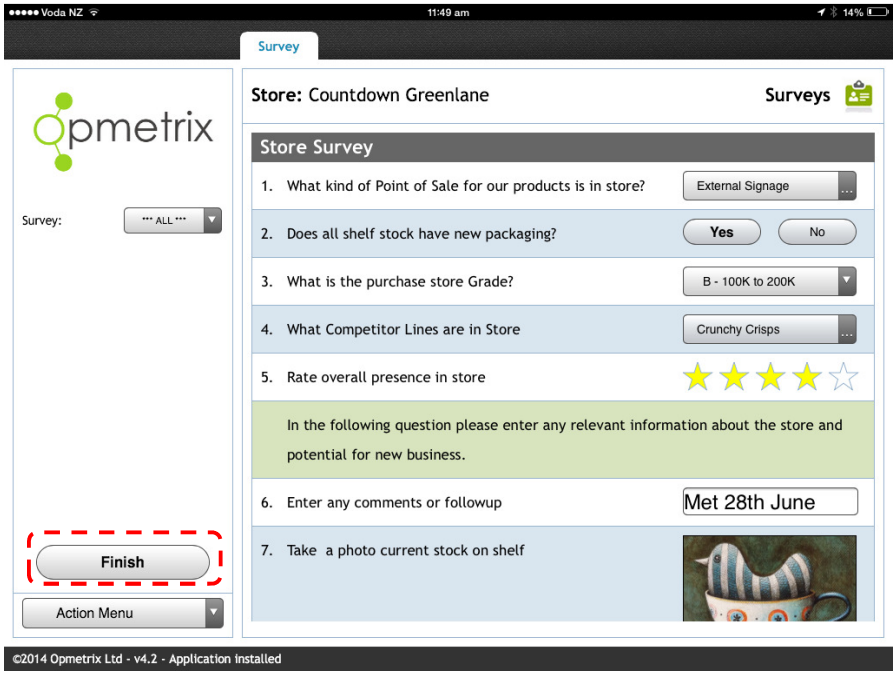
Refer to separate guide for details.

Surveys

Survey questions can include:

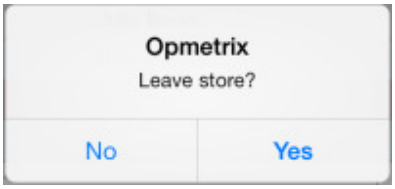
- Two Choice Answers
- Input Text
- Input Number
- Single Choice
- Multiple Choice
- Rating 1-5
- Instruction
- Photo

Once all answers have been completed, tap on finish


Voda NZ
11:49 am
14%
Survey
opmetrix
Survey:
*** ALL ***
Finish
Action Menu
Store: Countdown Greenlane
Surveys
Store Survey
1. What kind of Point of Sale for our products is in store?
External Signage
2. Does all shelf stock have new packaging?
Yes
No
3. What is the purchase store Grade?
B - 100K to 200K
4. What Competitor Lines are in Store
Crunchy Crisps
5. Rate overall presence in store
In the following question please enter any relevant information about the store and potential for new business.
6. Enter any comments or followup
Met 28th June
7. Take a photo current stock on shelf
©2014 Opmetrix Ltd - v4.2 - Application installed

Store Call – Exit

Exit the store on completion of your store visit. Exiting the store records the end time of this Store visit.



To Exit	Tap **Exit Store**
Confirm	Tap OK to confirm Exit Prompt
Sync	Complete the Sync process if you are online with good Wi-Fi/3G coverage

Merchandising

Merchandising Overview

Opmetrix merchandising allows checks and audits to be completed in-store to collect data on products or competitor brands that are ranged/not ranged in store or that have compliance issues e.g. are out of stock.

Opmetrix has three merchandising types

Distribution checks
Shelf checks
Price checks

Merchandising checks can be selected either from the task list if they are high priority, or by selecting the Merchandising tab then selecting the appropriate check.

Merchandising checks that are coloured red are flagged as compulsory tasks and should be completed while in store. If not completed, Opmetrix will prompt when the store is exited that they have not yet been actioned.

Distribution Checks

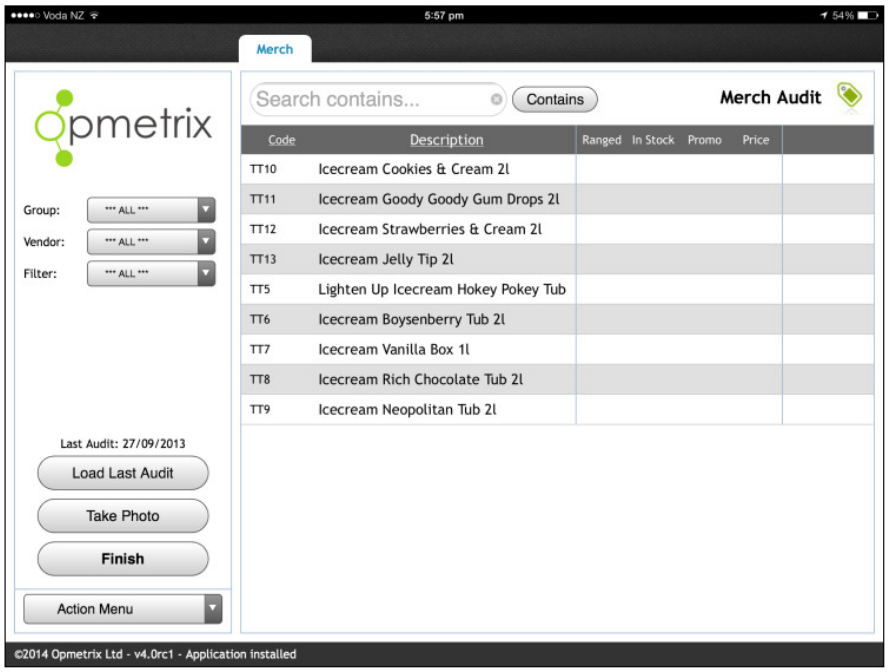
Distribution checks can collect 5 pieces of information regarding products, and optionally competitor products.

Ranged - Is the product ranged in store
In Stock – Is the product currently in stock on the shelf
Promo – Is the product price currently on promotion price
Price – The current ticketed price of the product
Note – an optional note about the product

If the product list is long, the standard search methods using product code and description are available, and filter options to display only a particular vendor/brand or product group can be used.

Tip

Check with your Manger to determine if you should always check all items or only changed items.



Depending on business requirements items should be checked on every visit or in some business cases only changed items e.g. newly ranged or discontinued items need only be checked.

The first time an outlet is visited all mandatory product should be marked as ranged/not ranged and any optionally ranged items should be marked. This ensures that a 'base position' for ranging is achieved for each store.

On subsequent visits users are able to download the previous check and apply any changes.

Actions	Locate the item, tap to enter a tick or cross in the Ticketed, in Stock and Promo Columns. Optionally enter a price or a note against the product line.
Take Picture	Captures a photo and attached it to this Distribution check. 1 photo can be attached per distribution check
Group	Filters the product list to the selected group. Select ALL to display all items
Vendor	Filters the product list to the selected Vendor (Brand or category). Select All to display all items
Filter Ticketed Only	Filters the product list to display only the items that have been ticked as ranged in this store
Mandatory SKU's	Filters the product list to display only items that are mandatory ranged (core range) for this outlet
Load Last Audit	Allows the last audit at this store to be downloaded and then edited as necessary
Finish	Finishes this distribution check. Note you can select the distribution check again from the task list and continue to edit/update this check. Once the store is exited, merchandising checks can no longer be edited.

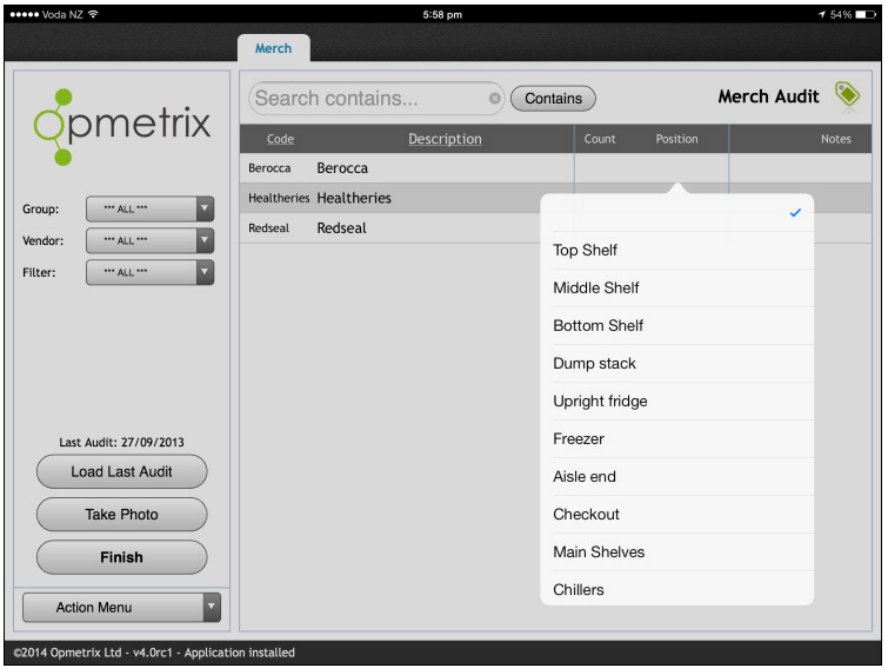
Shelf Checks

Shelf checks can collect 3 pieces of information regarding products, and optionally competitor products.

- Count - The number of product facings
- Position – The position on shelf/chiller or stack
- Note – an optional note about the product you are checking

If the product list is long, the standard search methods using product code and description are available, and filter options to display only a particular vendor/brand/competitor or product group can be used.

Shelf checks are often configured by a Brand or Category rather than individual products (SKU's) and include Competitor brands or categories. This is done to report on share of the total shelf or category.



Typically all items/categories in the list should be checked when entering Shelf checks. Items should only be skipped if they are not ranged in store.

Actions	Locate the item, tap to enter the count (Number of facings) and select the position. Optionally enter a note against Product/Category
Take Picture	Captures a photo and attached it to this shelf check. 1 photo can be attached per shelf check
Group	Filters the product list to the selected group. Select ALL to display all items
Vendor	Filters the product list to the selected Vendor (Brand/category/Competitor). Select All to display all items
Filter Ticketed Only	Not applicable on Shelf Checks
Mandatory SKU's	Not applicable on Shelf Checks
Finish	Finishes this shelf check. Note you can select the shelf check again from the task list and continue to edit/update this check. Once the store is exited, merchandising checks can no longer be edited.

Price Checks

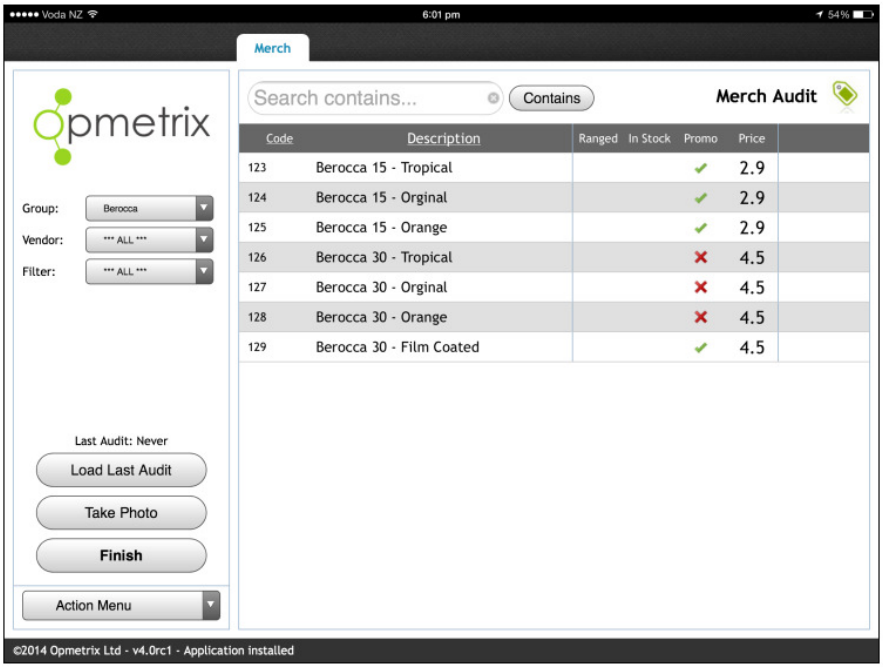
Price checks are most commonly used to check that products with a TPR (Temporary Price Reduction) have the correct promotion ticket on the shelf.

As promotional prices can change week to week a price list task is often named with the start/end date for that period. Eg *TPR Price checks 01/11/11 – 07/11/11*

3 pieces of information can be collected

- Promo - Confirm the product is on promotion or not
- Price – enter the current ticket price
- Note – an optional note about the product

If the product list is long, the standard search methods using product code and description are available, and filter options to display only a particular vendor/brand/competitor or product group can be used.



Typically all items/categories in the price check list should be checked. Items should only be skipped if they are not ranged in store.

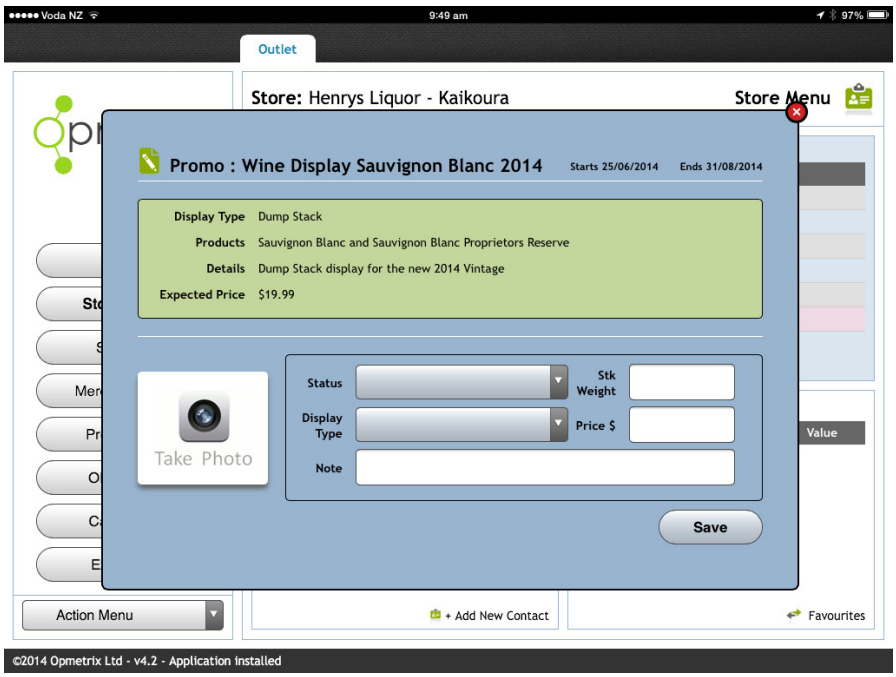
Actions	Locate the item, tap Promo column to tick/cross if item is on promo, enter the price and optionally record a note.
Take Picture	Captures a photo and attached it to this shelf check. 1 photo can be attached per shelf check
Group	Filters the product list to the selected group. Select ALL to display all items
Vendor	Filters the product list to the selected Vendor (Brand/category/Competitor). Select All to display all items
Filter	Ticketed Only. Not applicable on Price Checks
Mandatory SKU's	Not applicable on Price Checks
Finish	Finishes this shelf check. Note you can select the shelf check again from the task list and continue to edit/update this check. Once the store is exited, merchandising checks can no longer be edited.

Promotion Compliance

Promo Compliance Overview

Promotion Compliance is used to check that outlets have the correct promotional displays (eg aisle displays, counter displays) in store at the correct time.

For a promotion to be compliant it must adhere to conditions of the promotion such as the start/end date, the position in store, the correct products and the right price.



Active Promotions are listed in the main task list. These same promotions as well as future promotions (eg preview next week's promotions) can also be found by selecting the Promotions Module Button.

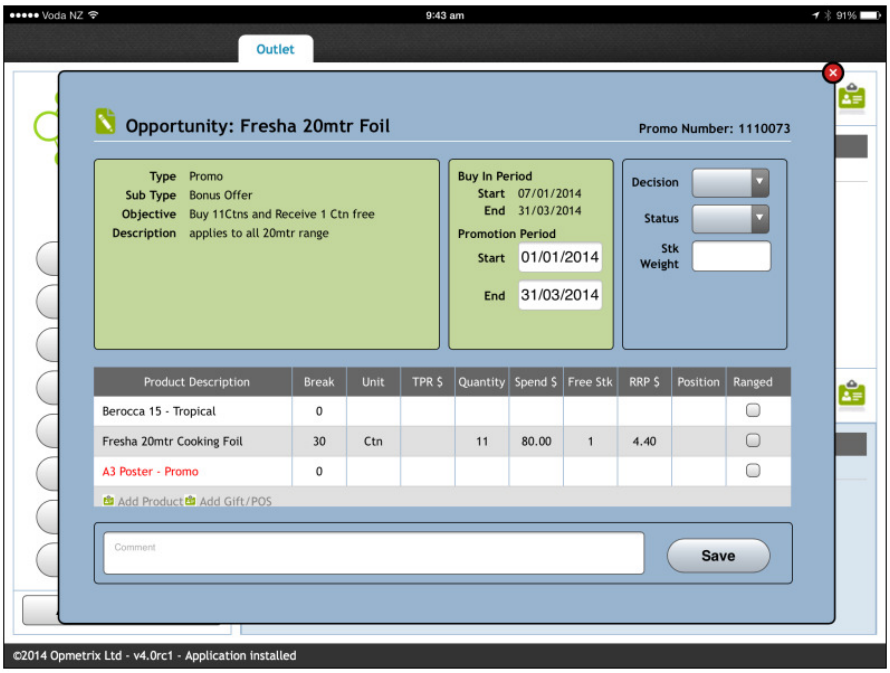
Actions	Select the Promotion task and complete the fields to advise if it is compliant or not.
Status	Select Pass / Fail

Display Type	Check the intended Display type then select the actual display type in store. If the display is not in store, select Not Setup
Stk Weight	Enter the amount of Stock on Display
Price $	Enter the Promo Ticket Price
Note	Optionally add a note about the display
Take Picture	Captures a photo and attached it to this check. 1 photo can be attached per promo compliance check.

Promotion Opportunity

Promo Opportunity

The Promotion Opportunity module can be used in many ways. Its standard purpose is to display a list of future promotions that can be offered to the store/outlet manager or buyer to get agreement on whether the outlet will accept or reject these opportunities.



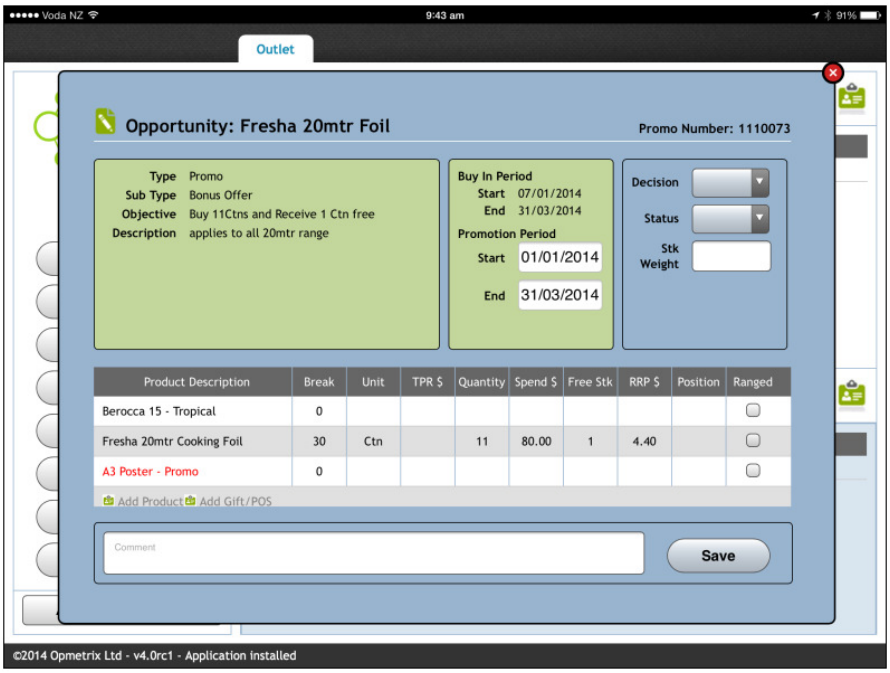
Examples:

- New Product Launch – record which stores will accept or reject new products
- Xmas Promotion - Offer a Xmas promotion with the ability to give away free stock or gifts
- Hospitality Monthly Table Talker – lock in a monthly special with an outlet and prearrange cost/sell prices in store

The purpose of the Promotion opportunities module is to measure the success of a promotion and to ensure it was offered to the correct outlets. In addition by tracking Trade Spend$ and Free Stock and gift, the cost of a promotion can also be measured.

Actions	Review the Promotion details (Type, Objective, Description, Dates and comment) and offer this opportunity in store. Record the decision and details.
Decision	Accepted, Pending Rejected
Status	Select the correct Status
Display Type	If a display has been agreed, select the display type
Stk Weight	If a stock weight for the display has been agreed enter the stock weight.
Promo Period	These dates will either display as either fixed (non editable) or the end date of the agreed promotion can be entered by the user.

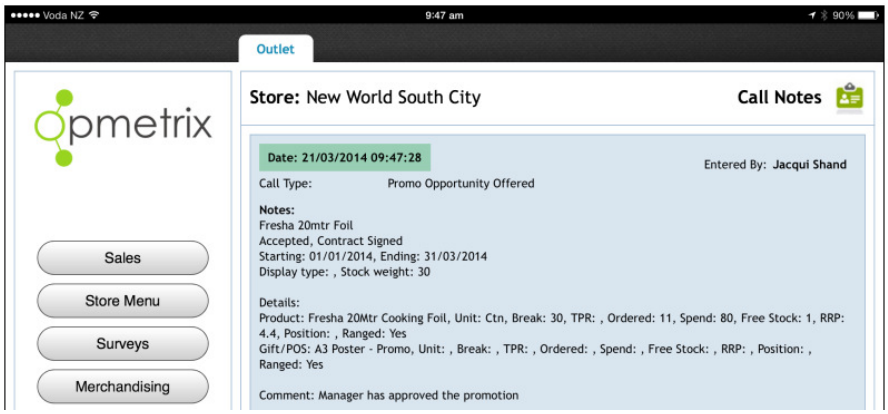
The next section of the Promo Opportunity enables product information to be recorded. This is not creating an order/invoice it is recording a product commitment enabling forecast reports to be generated on the success of a promotion.


Voda NZ
9:43 am
91%
Outlet
Opportunity: Fresha 20mtr Foil
Promo Number: 1110073
Type Promo
Sub Type Bonus Offer
Objective Buy 11Ctns and Receive 1 Ctn free
Description applies to all 20mtr range
Buy In Period
Start 07/01/2014
End 31/03/2014
Promotion Period
Start 01/01/2014
End 31/03/2014
Decision
Status
Stk Weight
Product Description | Break | Unit | TPR $ | Quantity | Spend $ | Free Stk | RRP $ | Position | Ranged
Berocca 15 - Tropical | 0
Fresha 20mtr Cooking Foil | 30 | Ctn | 11 | 80.00 | 1 | 4.40
A3 Poster - Promo | 0
Add Product
Add Gift/POS
Comment
Save
©2014 Opmetrix Ltd - v4.0rc1 - Application installed

Each of the columns can be set to fixed or editable depending on the promotion.

Break	The minimum qty that needs to be purchased in order to qualify for the promotion
Unit	Unit of measure for the product
TPR$	The temporary wholesale price the outlet can purchase the product for
Quantity	The forecast/intended qty the outlet will order
Spend$	The trade spend the outlet will receive
Free Stk	The amount of free stock (if any) that will be given to the outlet
RRP$	The agreed price in store for the product.

Comment	A comment can also be added to the promotion to record other details.
Add Product	Optionally the Add product button may be enabled. This is used to add product line details to the promotion and is often used where promotions are flexible or change regularly Eg (Monthly Table Talker promotion).
Add Gift	Gift lines display in red. Optionally the Add gift button may be enabled. This is used to add a gift to the current promotion
Save	Once a Promo Opportunity has been saved it will automatically create a calling card with the details entered. *See example* below.


Voda NZ
9:47 am
90%
Outlet
Opmetrix
Store: New World South City
Call Notes
Date: 21/03/2014 09:47:28
Entered By: Jacqui Shand
Call Type: Promo Opportunity Offered
Notes:
Fresha 20mtr Foil
Accepted, Contract Signed
Starting: 01/01/2014, Ending: 31/03/2014
Display type: , Stock weight: 30
Details:
Product: Fresha 20Mtr Cooking Foil, Unit: Ctn, Break: 30, TPR: , Ordered: 11, Spend: 80, Free Stock: 1, RRP: 4.4, Position: , Ranged: Yes
Gift/POS: A3 Poster - Promo, Unit: , Break: , TPR: , Ordered: , Spend: , Free Stock: , RRP: , Position: , Ranged: Yes
Comment: Manager has approved the promotion
Sales
Store Menu
Surveys
Merchandising

Contact Details

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Hours of Operation* 8.30am – 6.00pm Monday – Friday

*NZ Time and excludes New Zealand Public Holidays